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ABSTRACT

Methodological developments in comparative education have influenced those in comparative physical education and sport. The history of those developments in comparative education, moreover, are similar to those in the newer field. The overall methodological developments in comparative education have been the following: studies involving history and those designed to demonstrate national character; studies involving philosophical traditions, and these are, in the main, area studies; and comparative studies utilizing the topical approach and more sophisticated research techniques, particularly statistical methodology. With respect to physical education, every consideration should be given to the changing emphases, frameworks, and models in comparative education. Comparative education has proceeded from intuition, description, and analysis to prediction. The historical-philosophical-national character tradition has been superseded, to a large extent, by a movement towards the social sciences. The field of comparative physical education and sport has come a slower route, has attracted less worthy scholars, and is relatively new in the academic world. The descriptive, historical, philosophical routes will always be with us, but ultimately academic acceptance of comparative physical education will depend on a slow but assured movement into the social sciences. (Charts illustrating theoretical models are included.) (SK)

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METHODOLOGY IN COMPARATIVE STUDIES: AN OVERVIEW

by

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Methodological developments in comparative education have influenced those in comparative physical education and sport. The history of those developments in comparative education, moreover, are similar, and understandably so, to those in the newer field.

The overall methodological developments in comparative education have been the following: studies involving history and those designed to demonstrate national character; studies involving philosophical traditions, and these were, in the main, area studies; more comparative studies, utilizing the topical approach and more sophisticated research techniques, particularly statistical methodology. These will be discussed in turn, endeavoring to discuss a few physical education studies as well, as they appear.

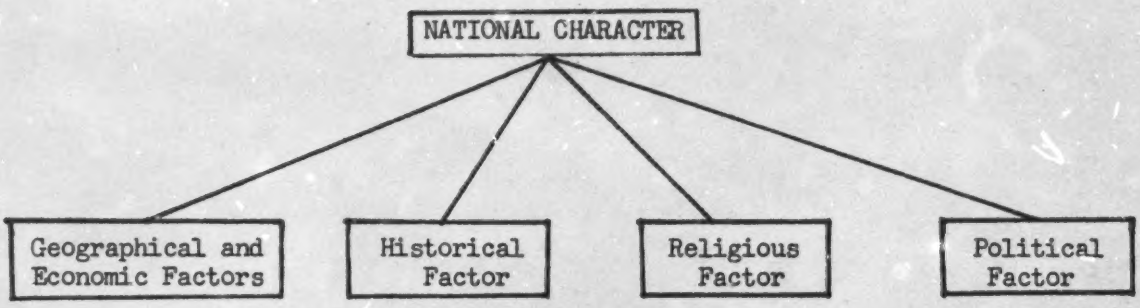
The National Character Approach

The national character approach could be considered a method. Its main exponent was Vernon Mallinson. Essentially, it was felt that what makes up education in a country is national character. English education, therefore, is what it is because of factors making up the national character of the nation. According to Mallinson there are four factors that make up the variable that is national character: education, social heritage, national environment and heredity.

As Mallinson says, however (1:29), one has to bear in mind "that the national character of a given group is never determined by one factor alone but rather by an intricate combination and interweaving of all the factors, some being dominant in one particular group, recessive in another, and so on."

The framework for the analysis of such national character is four-fold, as the following table demonstrates.

Table 1. Mallinson Framework Utilized For The Study of National Character.



The components of the framework are:

1. Geographical and Economic Factors. This is an analysis of the particular geography of a country and the various economic factors in that country to ascertain if there are factors that might influence frame national character.

2. Historical Factor. The study of the history of a country is necessary to ascertain those factors and influences which have had an effect on national character.

3. Religious Factor. Religious influences, likewise, need to be analyzed in a nation as to their influence on national character.

4. Political Factor. Throughout history the kind and amount of education has been related to the increase or decrease of a particular political outlook and belief, which likewise can have an effect on national character.

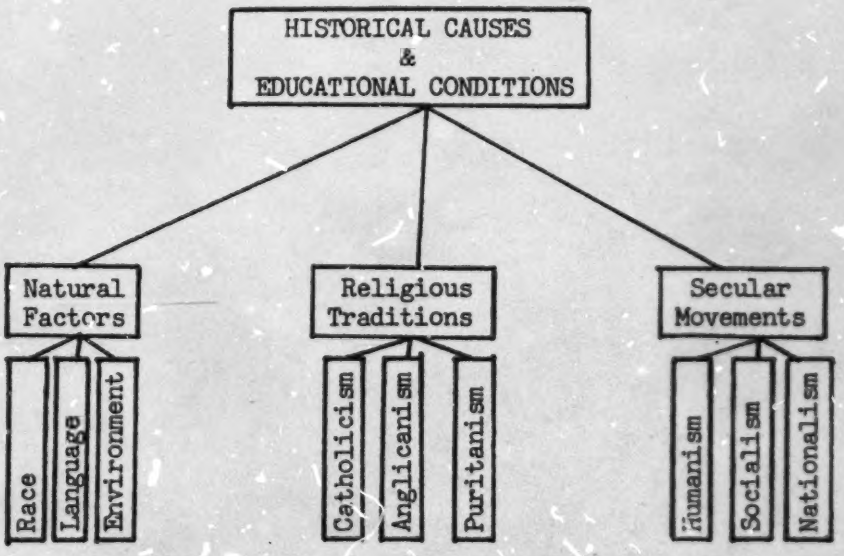
In physical education there have been proponents of the national character approach. It is no accident, it has been argued, that the Jahn system of gymnastics developed in Germany, the games approach in England, the Ling system in Sweden and the Bukh system in Denmark—these approaches were related to the national character of the people of those countries, and differed in certain respects. And these approaches were occasioned by an intermingling of geographical and economic, historical, religious

and political factors. With the development of the British Empire, games followed the flag, as the British believed that character could be developed by games, and weaknesses in national character could be developed by the discipline, sportsmanship, courage and so on that could be learned from games. The whole muscular Christianity movement has some relationship to the national character approach.

Historical Causes and Educational Traditions

The main proponents of the historical approach in comparative education are Isaac L. Kandel, Nicholas Hans and Robert Ulich. The Hans framework (2) is represented in the following table.

Table 2. The Hans Framework Utilized in the Historical Approach.

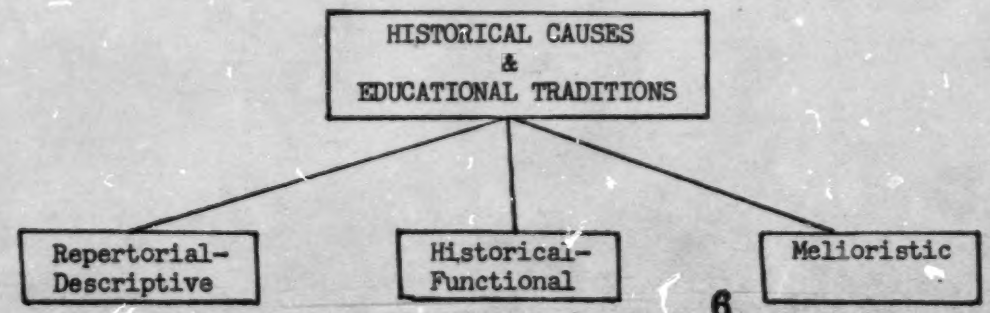


The analysis of Hans, then, would look at (a) the natural conditions of the country, (b) the religious traditions and (c) the secular movements. The national conditions which influence education, according to Hans, are (a) race, (b) the national language, and (c) the social and physical environment. The religious traditions are examined

as to the emphasis of (a) Catholicism, (b) Anglicanism and (c) Puritanism. The secular movements are analyzed as to the emphasis of (a) Humanism, whether the movement is one emphasizing people, particularly the liberation of people from prior conditions, (b) Socialism, emphasizing the prevention of exploitation of the masses and (c) Nationalism, where the emphasis is on the development of national character.

Kandel's main emphases are seen in the chapters of his book on Comparative Education (3). These were Education and Nationalism, Education and National Character, State and Education, Organization of National Systems of Education, Administration of Education, Elementary Education, Preparation of Elementary School Teachers, Secondary Education, Secondary School Teachers and Summary and Conclusions. He discussed the education systems in England, France, Germany, Italy, Russia and the United States. Kandel believed, of course (2:xi) that education was closely associated with the national, social, economic, industrial and hygienic progress of a nation, and therefore with the promotion of the national welfare and property. Within this historical method, Kazamias and Massialas feel (4) that the basic framework utilized by Kandel is three-fold: (a) repertorial-discriptive, where the facts are presented, (b) historical-functional, where the causes are examined, and (c) melioristic, where value judgments are made in an attempt to improve education in the world.

Table 3. The Kandel Framework Utilized in the Historical Approach (according to Kazamias and Massialas).



The use of the historical method has been common in physical education, particularly to explain sport in the society. The doctoral studies by the two Australians Peter Lindsay and Allan Cox are perhaps typical, utilizing rigorous historical methods in order to examine Canadian society (5,6). The preponderance of studies in physical education have fitted this approach, though there has been no systematic establishment of a model for analysis.

Philosophical Traditions

The philosophical approach is exemplified by Joseph Lauwerys. His basic belief is that each nation has a philosophical tradition or, at the least, orientation. As a consequence he believes that the philosophy of a nation is the important factor in the study of a nation. Indeed, social and political philosophies in operation in a country naturally effect the educational philosophy.

Many scholars in physical education have developed philosophies of physical education, which have evolved out of and related to the philosophy of education, which in turn should be related to the philosophy of a nation. Comparative studies have occasionally utilized philosophies and purposes, such as the ICHPER study, but not as an exclusive research technique.

The various approaches to this point have utilized what have been described as frameworks, methods of analysis for the study of education. They have utilized the national character approach, the historical and educational traditions approach and the philosophical approach. Some of the great names of comparative education were represented herein—Vernon Mallinson, Nicholas Hans, Isaac Kandel and Joseph Lauwerys, and their contributions were monumental ones, but modern comparative education has taken new turns, as indeed modern comparative physical

physical education and sport will increasingly take new turns. As Henry put it (8:231):

> The argument underlying almost all methodological discussion is that between the pragmatist and the theorist—whether comparative education is a means to a reformist end or a scholarly end in itself. Throughout the last twenty years many authors have claimed that comparative education represents the height of scholarship; we can learn a great deal from the observation of foreign education systems and that learning justifies the endeavor. But as many other authors have insisted on more precise educational goals—foreign educational systems are seen as adding perspective in order to enable more appropriate reform of one's own educational system or more insightful educational generalizations. This type of argument underlies all research, and it is interesting to note that one of the most recent contributions to methodological discussions (Kazamias 1972) argues that excessive concentration on non-pragmatic approaches has led to the present situation of comparative education being in jeopardy as an endeavor.

This overly pessimistic view is not applicable to physical education, where comparative courses have steadily increased in quantity and quality. The fact is, however, in comparative education there has been a movement away from the historical-national character-philosophical approach to one involving more of the social sciences, "from unidisciplinary to multidisciplinary, from observational to analytical, and from transplantation to selective reform" (8:231).

The first part of this paper, then, involves the use of frameworks in the analysis of education, the second part deals with theoretical models. Bridging the gap from the old to the new, however, is Arthur Moehlman. It might be argued that his work argues for a framework, but it was entitled a theoretical model, and at the least certainly influenced the development of theoretical models. Jones (9:74-79) calls the approach that of Culture Areas and the Theoretical Model.

Culture Areas and the Theoretical Model

Moehlman does not denigrate previous approaches, quoting Santayana (10:3) that "those who forget their past are condemned to repeat it," but he feels analyses of education should not only use cultural but topical methods. Individual educational systems should be examined in the context of individual cultures, but such topics and long-range factors such as scientific, technological, aesthetic, ethical, social, political and economic, which shape education systems, should be seen in historical perspective. These long-range factors are seen as a "circle of humanity" (10:9) in a space-time continuum, constantly in a slow process of acculturation. However, it is the impact of all these factors that occasions a profile of education in a particular country.

These long-range factors are used by Moehlman as a theoretical model to facilitate and analyze educational systems. The long-range factors studied, and what he included in them, are as follows:

LONG-RANGE FACTORS

I. (a) Folk - quantity and quality, ethnic sources
   (b) Space - spatial concepts, territoriality and natural features
   (c) Time - temporal concepts, historical development and evolution of culture

II. (a) Language - communication, vehicle through which culture grows
   (b) Art - vital factor in every culture for aesthetics and utility and play
   (c) Philosophy - value choices, pursuit of wisdom, without it no civilization, adventure and peace
   (d) Religion - ethics, good life, faith and belief

III. (a) Social Structure - elite and mass, family, kinship, sex, etiquette
   (b) Government - freedom and discipline, ordering of human relations
   (c) Economics - innovation and conservatism, production, consumption

IV. (a) Technology - adaptation and creativity, techniques, machines
   (b) Science - natural and human sciences

(c) Health - physique and intellect and emotional well-being

(d) Education - specialization and generalization, social process of directed learning

Jones (9:78) put, in tabular form, the theoretical model as he perceived it.

Table 4. Components of a Theoretical Model: A. H. Moehlman (from Jones, Phillip, Comparative Education: Purpose and Method, 1971).

Long-range factors (Column A)	Description of long-range factors (Column B)	Paramount issues (Column C)
	I	
Folk	Ethnic sources, quantity, quality, age-structure of population	Quantity and quality
Space	Spatial concepts, territoriality and natural features	Mutual aid and struggle for existence
Time	Temporal concepts, historical development and evolution of culture	Indigenous growth and external exchange
	II	
Language	Symbols, message systems, communication of conceptual thought	Communication and imagination
Art	Aesthetics, search for beauty and play	Aesthetics and utility
Philosophy	Value choices, pursuit of wisdom and the good life	Adventure and peace
Religion	Relation of man and the universe, belief systems	Ethics and faith
	III	
Social structure	Family, kinship, sex, etiquette, and social classes	Elite and mass
Government	Ordering of human relations, governmental structures and operations	Freedom and discipline
Economics	Satisfaction of wants, exchange, production, and consumption	Innovation and conservatism
	IV	
Technology	Use of natural resources through machines, techniques and power resources	Adaptation and creativity
Science	The sphere of knowledge concerning both natural and human realms	Natural sciences and human sciences
Health	The condition of physical, emotional, and mental well-being, including functions of living	Physique and intellect
Education	The social process of directed learning, both formal and informal	Specialization and generalization

Moehlman, then, bridged the gap between the two schools of thought as comparative education moved toward the social sciences.

The Scientific Method

Area Studies

George Bereday, in the book Comparative Method in Education, endeavored to assist the field of comparative education in becoming "a fully fledged academic discipline" (11:ix). As Bereday put it (11:ix-x):

> Comparative has or should have a firm mooring within the precincts of one of the older social sciences. Its strongest affinity is to political science, or perhaps to geography. Apart from such major methodological commitments, comparative education relies on the methods of a host of other fields, from philosophy to psychology, from literature to statistics. Its specific task is to bring several of the concerns of the humanities and the social sciences together in application to a geographical perspective of education.

We tend to forget, sometimes, that the humanities can also be considered as important as the social sciences—the search for respectability of the sciences can occasionally strangle progress, as the link with the humanities is obvious, respectable and needed. Statistics does not necessarily replace common sense. The computer, indeed, is only as important as what is put into it.

In any case, Bereday's book was a landmark in the field, and has had a considerable influence as it pushed the field more to the social sciences. The ultimate purpose of any science is, understandably, prediction and control, utilizing hypotheses that can be tested, and generalizations, so that slowly the field can move towards explanation. In any case, Bereday spoke of the reliance of the field of comparative education on such fields of study as economics, anthropology, political science, geography and [illegible].

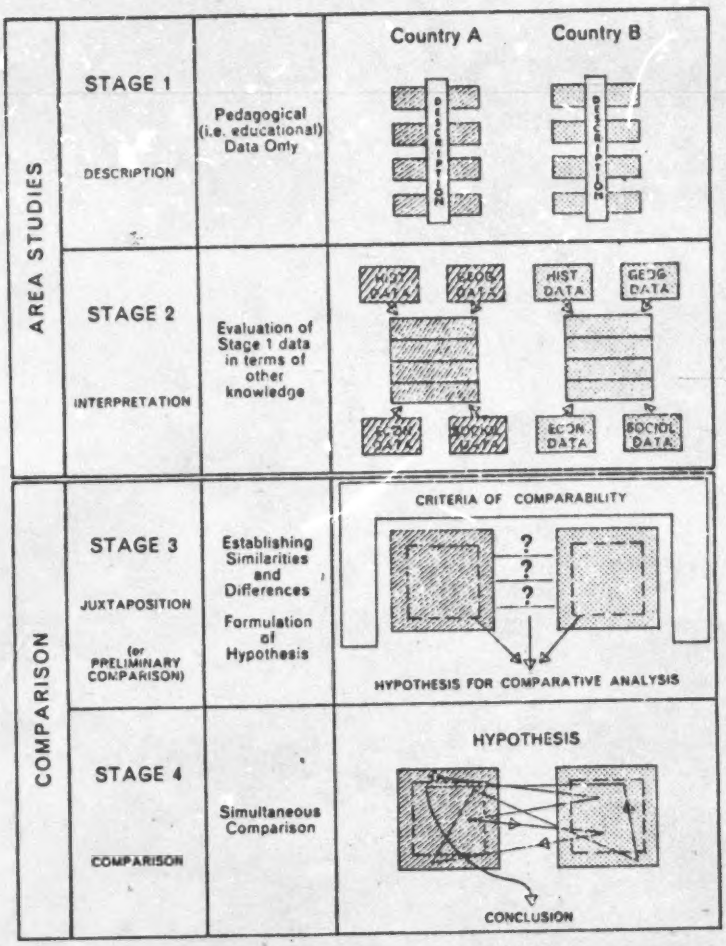
As Bereday's theorizing developed, his model took in four parts: (a) Description, (b) Interpretation, (c) Juxtaposition, and the ultimate stage, (d) Comparison. With respect to Description (11:11), "the two major aspects of study in foreign schools are the follow-up of printed sources and school visitations." The second stage involves (11:19) "not description but interpretation of information and consists of subjecting the pedagogical data to scrutiny in terms of other social sciences." In order to be successful in interpretation, Bereday felt that a person should be able to understand two or three disciplines other than education. The words of Bereday are applauded (11:21):

> All of the humanities and social sciences should be used to broaden the vistas of comparative education. To this day no school program can be adequately explained without reference to the ultimate philosophical commitment of the society it serves, nor can educational changes be compared while ignoring the historical period in which they take place. Comparative analysis is now concerned with the sociological impact of education upon the formation of public opinion, the economic roles of education as public investment, or the changing rights of parents versus the political community in determining education progress.

Area studies become comparative, and the scientific aspects are increased by the next two stages, Juxtaposition and Comparison. Juxtaposition is used when two or more area studies are studied, and refers to the establishment of similarities and differences in such area studies. A hypothesis may be formulated at this stage, based on the data. Juxtaposition is really a preliminary comparison. The fourth step is comparison, looking at the hypothesis or hypotheses and arriving at conclusions.

The model is summarized by Jones (11:88) in the following table.

Table 5. Four Stages of Comparative Methodology (After G.Z.F. Bereday in Jones, Phillip, Comparative Education: Purpose and Method, 1971).



The real advantage of the Bereday model was that at least a framework was suggested for scientific comparison.

Prediction in Scientific Studies and The Problem Approach

Brian Holmes took the model a step further by endeavoring to establish the possibility of prediction. As Holmes put it (12:29):

> . . . In short, it is assumed that a 'science of education' giving directive power can be developed

> through comparative studies, and that the search for the underlying principles which govern the development of all national systems of education is important. . . the 'problem approach' can serve both ends in comparative education.

Holmes is, essentially, concerned with prediction, and is influenced in his approach by John Dewey's method of solving problems. Once the problem is apparent, and there is a desire to solve it, the methodology is clear (12:32-33):

> Between the pre-reflective situation (confusion or perplexity) and the post-reflective situation (perplexity resolved), a number of reflective processes take place. These may be grouped under (i) hypothesis or solution formulation, (ii) problem intellectualisation or analysis, (iii) analysis and specification of context, (iv) logical deduction of consequences, and (v) practical verification.

It was realized by Holmes, of course, that the comparative educationist was interested mainly in the first four stages of Dewey's reflective thinking approach, verification being a problem in educational matters. In any case (12:34): "The problem approach implies that understanding of social and educational processes comes from successful prediction rather than, as in some epistemologies, through the discovery of antecedent causes."

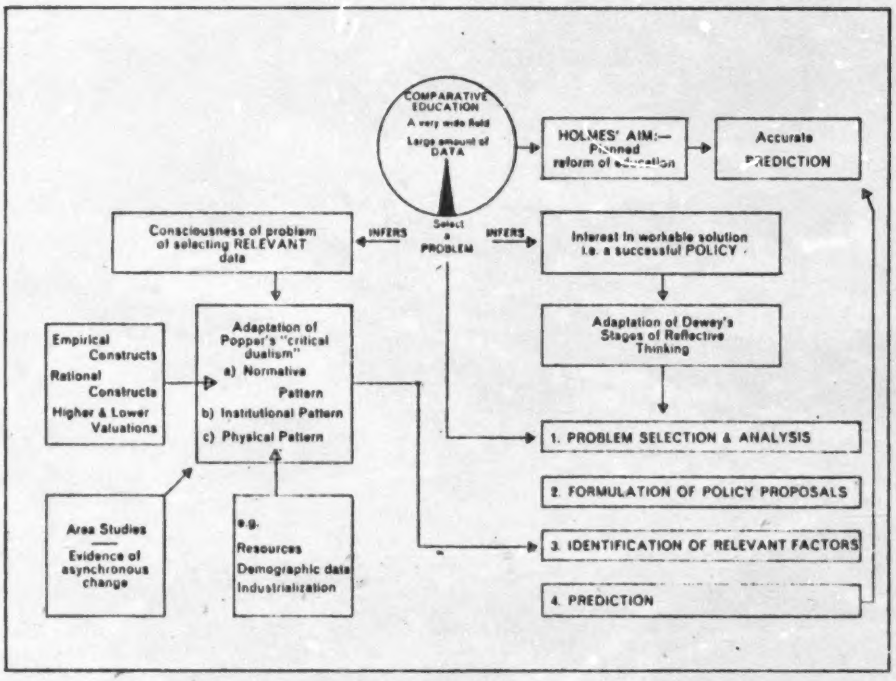
What is imparted is how Holmes viewed the complexity of the task (12:46):

> . . . comparative studies designed to contribute to formulation of educational policy should be inter-disciplinary in character. Evidently at each stage in the process of reflective thinking (the problem approach) the cooperation of economists, political scientists, sociologists, philosophers, anthropologists, and comparative educationists is desirable. Jointly they should proceed to analyze or intellectualize the problems under examination by formulating relevant questions. Each, of course, should be free to propose possible solutions. The contextual background would consist of data drawn from all or most of the social sciences, and each participating member would help to identify, select, and weigh the relevant background

factors. Each could no doubt contribute techniques by which the number of variables are reduced to manageable proportions. Finally, each discipline might suggest techniques appropriate to the task of logically deducing consequences or outcomes in the light of specified initial conditions.

The model utilized by Holmes in his Predictive Studies is diagrammed by Jones (12:97).

Table 6. Methodology proposed by Brian Holmes (from Jones, Phillip, Comparative Education: Purpose and Method, 1971).



Critical Dualism

Popper's critical dualism (13) was presented with the problem approach in mind, but is another conceptual framework that is worthy of analysis. Essentially, the (12:50) "framework is basically an attempt to classify data of different kinds in a way which will enable various kinds of comparative study to be made more vigorous."

Critical dualism argues that (12:50-51) " in any society there can be identified and distinguished two types of law—the normative and the sociological." Normative laws can be changed by man, and the degree to which man can challenge laws, his freedom, is a measure of an open society. Closed societies do not allow such change—social norms do change but in certain societies with difficulty.

> If normative laws represent an area in man's social environment in which he is able to choose freely, some changes in society are less under his direct control—or rather can be controlled only by using scientific techniques. These changes occur in accordance with sociological laws. Critical dualism, in fact, assumes that there are operating within any social environment a number of regularities which are similar to those found to apply to man's physical surroundings—in physics, chemistry, and biology. Such sequences of social events can be stated in sociological laws which bear to man's social environment the same kind of relationship that natural laws bear to his physical environment. They can be used to explain the operation of social institutions or organizations such as schools, insurance companies, industrial concerns, trade unions, and so on. They make predictions possible in the social sciences.

The model for comparative education based on the concept of critical dualism developed by Popper and Holmes consists of three parts, essentially: (a) Normative pattern - this involves empirical and philosophical techniques in order to provide rational constructs. The nature of man, the nature of society and the nature of knowledge will be ascertained in a society, so that the information may be used in a comparative manner; (b) Institutional pattern - the descriptive analysis of educational systems, within the specific cultural context, is required herein—description and explanation are included, as well as analyses of political, economic and educational institutions, administration, and finance at the national, regional and local levels, as well as the structure of the system, the selection of students, examinations, guidance,

psychological services, methods of teaching, discipline, extracurricular services, and ancillary services, as well as legal frameworks, (c) Physical pattern or material circumstances - these deal with the geographical features, the physical terrain.

There are real difficulties in this approach, particularly because it is not a static model, and is somewhat difficult to understand, particularly how to identify change. It is an attempt, however, to combine the theoretical with the practical.

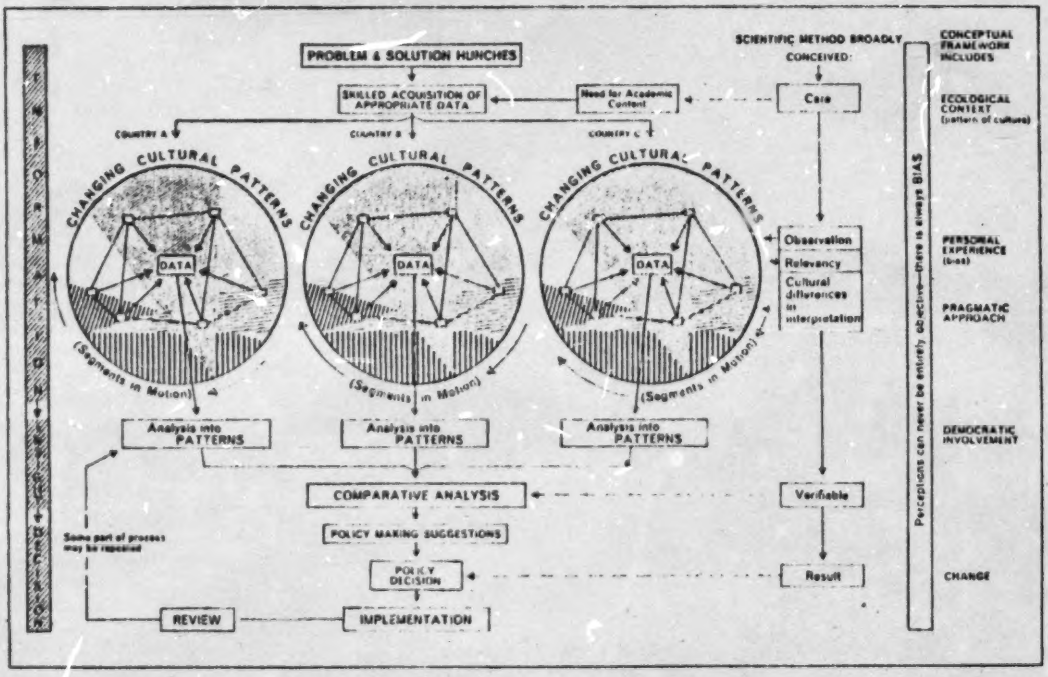
King's Model - The Conceptual Framework

King has been criticized somewhat because he has not been scientific but this has mainly been based on his popular book Other Schools and Ours (4) and his editing of other descriptive books; but Comparative Studies and Educational Decision (15) presented a different King to the world of comparative education. As Jones put it (9:127-128), describing the conceptual framework he advanced:

> The first element. . . is that of rapid social change and the second comparative education's role of assisting in decision making, by supplying educational insights rather than by accepting the idea of immutable social "laws". . . The third element seems to be that of involvement, or commitment, in a democracy . . . comparative education is no mere academic and isolated pursuit; it is an analytical and reconstructive agent in educational changes which these days have so many important political and social overtones. Better, he says, to have democratic involvement of those most able and knowledgeable. Participation, variety, flexibility, evolution of ideas add up to democratic involvement.
>
> A fourth element is the pragmatic approach in that, while the idea of laws is rejected, the use of hypotheses, etc. is commended. . .
>
> The fifth and final element . . . is the firm belief that work in the social sciences is, of necessity, carried out under conditions different from those in physical science. . . What follows is that, given admittedly difficult conditions for some kinds of social research, the researcher must make his work as scientific as possible or develop modifications of the scientific method suitable for use with phenomena in complex cultural situations . . .

The collection of data is conceived by King as the first stage in comparative studies, then the analysis of the data, endeavoring to analyze difficult cultural patterns, after which policies may be developed. The implementation is the last stage. This model is summarized by Jones (9:130):

Table 7. Methodology Proposed By Edmund J. King (from Jones, Phillip, Comparative Education: Purpose and Method, 1971).



Classifying Methodological Approaches - Higson

Higson has attempted to categorize the various writers in comparative education (9:138):

Table 8. Six Main Methodological Approaches to Comparative Education: F. M. Higson (from Jones, Phillip, Comparative Education: Purpose and Method, 1971).

No.	Description of group	Components	Examples
1	Micro-historic	CMiHD	Kazamias
2	Micro-dynamic	CMiCtD	Bereday, Holmes
3	Micro-static	CMiCtS	Anderson, Holmes
4	Macro-dynamic	CMaCtD	Lauwerys, Bereday?
5	Non-construct-dynamic	NMiCtD	Rossello
6	Historico-dynamic	NMaHD	Hans, Kandel, Mallinson

Table 9. Higson's Minor Classification Criteria (from Jones, Phillip, Comparative Education: Purpose and Method, 1971).

Criteria of categorization	Dichotomous categories	
5. Whether educational processes *per se* analyzed	Educational-societal analysis	Intra-educational analysis
6. Geographic scope of analysis	Local	Global
7. Nature of data compared	Quantitative	Qualitative
8. Author's main reasons for undertaking analysis	Neutral	Melioristic

There are eight criteria he uses to categorize the various comparative educators, each of which is a dichotomous category. Category (1) is construct: anti-construct, that is some educators use constructs and some do not; (2) relates to microcosmic:macrocosmic, the degree of analytic abstraction; (3) relates to contemporaneous:historical, the main locus in time of relevant data; (4) relates to static:dynamic, that is whether social change is analyzed.

With respect to physical education, every consideration should be given to the changing emphases, frameworks and models in comparative education. Indeed, comparative education has proceeded from intuition, description and analysis to prediction. The historical-philosophical-national character tradition has been superseded, to a large extent, by a movement towards the social sciences. The field of comparative physical education and sport has come a slower route, has attracted less worthy scholars, is a relatively "new boy" in the academic world. But the lesson is clear—the descriptive, historical, philosophical routes will ever be with us, but ultimately academic acceptance will depend on our slow but assured movement into the social sciences. Worthy and virgin territory awaits the discriminating and devoted scholar.

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